

FIGS. 3A through 3D are a chart that illustrates a sample lead management form that is used by the seller of goods/services to input lead qualification information (BANT data) and product and/or service interest information.

Replace paragraphs [0011] through [0014] with the following 4 paragraphs:

[0011] Customer lead 12 may access the business's web site 14 via a connection on a computer network such as the internet using a personal computer, or any other type of similar device, capable of accessing a computer network. Once the customer lead 12 accesses the company's web site 14, the customer lead 12 proceeds to view various marketing promotions that the business has created. Upon selecting a desired marketing promotion, the customer lead 12 has two main methods in which he can request additional information regarding the desired product or service. The customer lead 12 can also request additional information at the end of the customer needs feedback form 18 (See 116 in FIG. 2D). The first method in which a customer lead 12 can request additional information is by sending an e-mail message to the designated seller's (company representative 20) e-mail address 16 requesting the additional product/service information. The specific nature or content of the request is detected automatically by web administrative software and the appropriate response is e-mailed back to the lead or customer lead 12. This response back to the customer lead 12 may be comprised of an e-mail text message or an e-mail test message with a file attachment containing an "e-brochure" or "e-collateral." An "e-brochure" or "e-collateral" contains information relating to the products or services that the company is promoting and allows the customer lead 12 to print the information out at his or her local printer. The second method a customer lead 12 can use to respond to a business's marketing promotion is to fill out a customer needs/feedback form 18, illustrated in FIGS. 2A-2D, and is linked to the promotional marketing offer, located on the company's corporate (Internet) web site 14.

[0012] FIGS. 2A-2D show a sample form that illustrates the components of a sample customer needs/feedback form 18. The questions on this form 18 are designed to be incorporated into a virtual reality activity or a regular CGI script form, which can be integrated into the company/seller's existing Internet web site 14 and linked to the seller's Lead Management Intranet site 22 (See 34 in FIG. 1). This form 18 could be a

fun game-type virtual reality activity to be integrated into an existing Internet web site and linked to a Lead Management Intranet site 34. This is to give a complete picture of how the company can help the customer. It becomes possible to match what the customer lead 12 indicates they really want or need to the solutions the company representative says the customer lead 12 is interested in to provide a total solution. This form 18 is designed to be filled-out by the customer lead 12 and should be needs oriented, in contrast to the Lead Management Form 24, 26, which is designed to be filled out by the company representative 20 and is qualifications and solutions oriented. These two forms 12 and 24, 26 are linked to form a lead profile record 32 in the lead management database 44 and will be accessible via the lead management intranet site 34. The first field that the customer lead is prompted to enter information into is entitled Marketing Information 60. The user has the option of entering text or selecting a check box to indicate his or her desired selection. Specifically the customer lead 12 is prompted to answer the question "How did the customer lead come to know of the business?" 62 The customer lead 12 is given the option of several answers that he or she may select that include: by published article, by published advertisement, by direct mail invitation, by e-mail invitation, by internet web site, or by other. The customer lead 12 is further prompted to answer "How did the particular promotional method make the customer want to come to the meeting, campaign event, or web site?" 64. A list 64a of possible choices is presented to the customer lead 12 to select from. The customer lead 12 is also prompted for contact information 66 including his or her first name 68, last name 70, the customer's title or position 72, job responsibilities 74, company name 76, type of business 78, e-mail address 80, internet address 82, street address 84, city 86, country 88, state 90, zip code 92, customer's telephone number 94, fax number 96, mobile phone number 98, and pager number 100. The next section that the customer lead 12 must enter data into on the customer needs/feedback web page 18 is entitled "Needs/Solutions Information" 102. In this section 102, the customer lead 12 will be required to rank specific attributes of the business's products or services based on importance to the customer lead 12. After all of the preceding data is entered by the customer lead 12, the Customer Needs/Feedback form 18 prompts the customer lead 12 with a series of targeted questions 104 that allow the customer lead management system 10 to compute a solution to the Customer lead's 12 problem. Furthermore, for

the sample customer needs/feedback form 18, the customer lead management system 10 computes a monetary amount 106 that the customer lead 12 may be losing by not employing the company's goods or services. After the feedback form 18 has selected an optimized solution to the customer lead's 12 problem, the customer lead management system lists a range of potential product/service solutions that the customer lead 12 may be interested in. The customer lead 12 is prompted to select the goods or services that it desires to view 108. The customer lead 12 is prompted to select the goods or services that it desires to view 108. The customer lead 12 is also prompted to provide an explanation 108a of what the selected products/services do for him. Additionally, the feedback from 18 provides the customer lead 12 with the ability to comment on the company's products and services in the comments/feedback section 110. Finally, the customer needs/feedback form 18 provides the customer lead 12 with a series of options 112 that allows the customer lead 12 to choose a particular course of action regarding the business's goods and services. These options 112, include the ability of the customer lead 12 to request to ask the company questions regarding its offered goods and services 114. If the customer lead 12 selects this option 114, a company representative 20 is automatically notified with the customer lead's request via e-mail or by a pop-up window via the Lead management Intranet 22. The customer lead 12 may also request detailed information or brochures 116. If the customer lead 12 selects this option, collateral web pages from the company's Internet site 14 appear allowing customer to have the product/service documentation e-mailed, faxed, or printed out for the customer lead 12, locally on demand. The customer lead 12 can also select to view a specific solution in action 118. If the customer lead 12 selects this option 118, collateral web pages from the company's Internet site 14 appear allowing the customer lead 12 to select which product or service the customer lead 12 would like to view an online video clip of. Additionally, if the customer lead 12 is attending a trade show the company representative 20 could demonstrate the product or service for the customer lead 12 in person. The customer lead 12 may also select to schedule an off-site meeting 120. If this option 120 is selected, the customer lead 12 is connected to Lotus Notes Calendar and the appropriate company representative 20 will be automatically notified, by e-mail or an on-screen message alert, of the customer lead's 12 desire to schedule a meeting. The final option that the customer lead 12 is provided

with is a promotional offer from the company 122. If the customer lead selects this option 122, the appropriate company representative 20 that deals in the specified goods or services is automatically notified by an e-mail message or pop up computer screen messages via the lead management intranet 22. The last item on the customer needs/feedback form 18 is the name of the solutions/account executive 124, the title of the executive 126, telephone number 128, fax number 130, pager number 132, e-mail address 134, and Internet address 136 of the executive.

[0013] Alternatively, the company representative 20 can enter customer lead data into one of the lead management forms 24 26 (a sample form 24, 26 is shown in FIGS. 3A-3D) as he or she is engaging a potential customer lead 12 in a conversation. Lead management form 24 is a web-based form and lead management form 26 can be used when the company representative 20 is using a portable computer. The form content may be similar for both forms 24, 26 or form 26 may be condensed and reformatted to accommodate the smaller screen of a portable devices such as an IBM Workpad<sup>TM</sup> (a remarketed version of the Palm Pilot). In a trade show scenario or any one-on-one interpersonal contact scenario, it would be more advantageous if the customer lead 12 filled out the Customer Needs Feedback form 18 before he talks to the seller or company representative 20, however this is not required. Furthermore, by allowing the company representative 20 to initiate a personalized conversation such as "Hi, my name is Ed. Glad to meet you John Doe. Let me pull up your profile...". The seller or company representative 20 can enter the customer lead's contact, needs, product/service interests and marketing campaign information, what brought them to the web site or event, etc. data into the Customer Needs/Feedback form 18 as the representative 20 proceeds to talk with the customer or while showing the product/service features/benefits to the customer lead 12. During or at the end of the meeting, with the customer, the company representative 20 can then input the data needed for the Lead management form 24, 26. If a mobile device is used, such as an IBM Workpad<sup>TM</sup>\Palm Pilot, then the input by the company representative 20 could be entered into 26 during the customer lead 12 engagement/interaction. If a Customer Needs/Feedback form 18 has been filled out completely, the company representative 20 will not have to enter any other type of information except for Campaign/Event

Information 152, Qualification or BANT information 174, Solutions Information 342 and Follow-Up Information 352.

[0014] In order for the company representative 20 to access and input customer data into the sample lead data form 24, 26 illustrated in FIGS. 3A-3D, the seller/company representative 20 accesses the company's Intranet site 22 by entering a security code or password to access the sellers' virtual private network or intranet for the lead management database 44. The company representative 20 may access the lead management Intranet site 22 in a variety of ways that include using a personal computer, or any other device that is capable of transmitting and receiving data via a computer network. The company representative 20 may or may not physically be at a trade show, business event or at another one-on-one kind of interpersonal meeting with customer leads 12. The seller or company representative 20 accesses the lead management form 24, 26 illustrated on FIGS. 3A-3D on any of the following mobile telecommuting systems and proceeds to ask the lead or customer for answers to the questions on the lead management form, which include contact, product and/or services interest, and BANT information, solutions, campaign/event, follow-up/tracking, marketing awareness, etc.:

Replace paragraph [0020] with the following paragraph:

Next, FIGS. 3A-3D illustrates the lead management form 24, 26 of the customer lead management system 10 and the information concerning the customer lead 12 that is entered by the company representative 20. The first section of the lead management form 24, 26 is entitled Campaign/Event Information 152. This section is adapted by the company in accordance with its marketing promotions and campaign events. Specifically, this information comprises the name 154, date 156, location 158, type 160, and demographics 162 information that relate to the marketing campaign and event. Additionally, the company representative 20 is prompted to specify if the event will be a trade show or other type of event 164. If the event is a trade show, the company representative 20 is further prompted to enter information relating to the booth presentation schedule 166, speaker session schedule 168, the social events that are taking place at the trade show 170, and any other activities that a customer lead 12 can be involved in 172.

IN THE CLAIMS:

Regarding the 35 U.S.C. 112 reference to "The specification shall conclude with one or more claims particularly pointing out and distinctly claiming the subject matter which the applicant regards as his invention," claims 1-20 have been revised accordingly.

Please amend claims 1- 4, 7, 9, 11, 12, 14, 15-17, and 20 as follows:

1. (Currently Amended) A system for managing customer lead information comprising:
  - a customer lead information database having a plurality of customer lead profile records;
  - means for acquiring customer lead information from a customer lead;
  - means for dynamically capturing and responding to acquired customer lead information via at least one of an intranet and an internet through the use of customer lead web pages which interact with, and request data from, a customer lead management server database, populating the data fields of said pages from said server in real-time;
  - means for creating or updating a customer lead profile record based on customer lead information dynamically captured in real-time;
  - means for qualifying customer leads and determining a customer lead priority utilizing a ranking algorithm or score based on information in the customer lead profile record, such that the results of said ranking can be displayed in real-time within any web page containing a sales lead management form;
  - means for automatically adding the customer lead priority ranking to the customer lead profile record;
  - means for automatically storing the customer lead profile record in the customer lead management server database; and
  - means for electronically distributing customer lead records and information in real-time, via at least one of an intranet and an internet.

2. (Currently Amended) The system according to claim 1, further comprising:  
means for automatically electronically notifying at least one designated person when pre-determined data fields of a customer lead profile record are changed or are populated, resulting in a change in customer lead priority ranking, or resulting in any other pre-determined triggering event requiring attention by a company representative.
3. (Currently Amended) The system according to claim 2, wherein the means for automatically electronically notifying at least one designated person comprises means for e-mailing, or otherwise electronically alerting, the at least one designated person in real-time.
4. (Currently Amended) The system according to claim 1, wherein the means for acquiring customer lead information comprises one of means for electronically presenting a customer needs feedback form to a customer lead and means for presenting a lead management form to a company representative.
7. (Currently Amended) The system according to claim 6, wherein the means for inputting the acquired customer lead information comprises means for entering information into the lead management form.
9. (Currently Amended) The system according to claim 1, wherein the means for determining a customer lead priority ranking comprises means for analyzing the information in the customer lead profile record for information related to at least one of the customer lead's budget, authority, needs, and timeframe.
11. (Currently Amended) The system according to claim 1, further comprising:  
means for electronically responding to information requests from the customer lead in real-time.
12. (Currently Amended) A system for managing customer lead information comprising:  
a customer lead information database having a plurality of customer lead profile records;

means for acquiring customer lead information from a customer lead, the means for acquiring customer lead information comprising one of means for presenting a customer feedback form to a customer lead and means for presenting a lead management form to a company representative, the customer needs feedback form comprising at least one web page, the lead management form comprising at least one web page;

means for dynamically capturing and responding to acquired customer lead information via at least one of an intranet and an internet through the use of customer lead web pages which interact with, and request data from, a customer lead management server database, populating the data fields of said pages from said server in real-time;

means for creating or updating a customer lead profile record based on customer lead information dynamically captured in real-time;

means for qualifying customer leads and determining a customer lead priority utilizing a ranking algorithm or score based on information in the customer lead profile record; such that the results of said ranking can be displayed in real-time within any web page containing a sales lead management form;

means for automatically adding the customer lead priority ranking to the customer lead profile record;

means for automatically storing the customer lead profile record in the customer lead management server database; and

means for electronically distributing customer lead records and information in real-time, via at least one of an intranet and an internet ; and

means for automatically electronically notifying at least one designated person when pre-determined data fields of a customer lead profile record are changed or are populated, resulting in a change in customer lead priority ranking, or resulting in any other pre-determined triggering event requiring attention by a company representative.

14. (Currently Amended) The system according to claim 12, wherein the means for automatically electronically notifying at least one designated person comprises means for e-mailing, or otherwise electronically alerting, the at least one designated person in real-time.



15. (Currently Amended) The system according to claim 12, wherein the means for determining a customer lead priority ranking comprises means for analyzing the information in the customer lead profile record for information related to at least one of the customer lead's budget, authority, needs, and timeframe.

16. (Currently Amended) A method for managing customer lead information comprising:

providing a customer lead information database having a plurality of customer lead profile records;

acquiring customer lead information from a customer lead, the means for acquiring customer lead information comprising one of means for presenting a customer feedback form to a customer lead and means for presenting a lead management form to a company representative, the customer needs feedback form comprising at least one web page, the lead management form comprising at least one web page;

dynamically capturing and responding to acquired customer lead information via at least one of an intranet and an internet through the use of customer lead web pages which interact with, and request data from, a customer lead management server database, populating the data fields of said pages from said server in real-time;

creating or updating a customer lead profile record based on customer lead information dynamically captured in real-time;

determining a customer lead priority utilizing a ranking algorithm or score based on information in the customer lead profile record, such that the results of said ranking can be displayed in real-time within any web page containing a sales lead management form;

automatically adding the customer lead priority ranking to the customer lead profile record;

automatically storing the customer lead profile record in the customer lead management server database; and

electronically distributing customer lead records and information in real-time, via at least one of an intranet and an internet.

17. The method according to claim 16, further comprising:

automatically electronically notifying at least one designated person when pre-determined data fields of a customer lead profile record are changed or are populated, resulting in a change in customer lead priority ranking, or resulting in any other pre-determined triggering event requiring attention by a company representative.

20. (Currently Amended) The method according to claim 16, wherein the step of determining the customer lead priority ranking comprises:

selecting at least one of customer budget related, authority related, needs related and timing related information from the customer lead information; and  
analyzing the selected information.